



Customer Relationship Banker

Title	Customer Relationship Banker (CRB)
Office	Sarasota
Reports to	VP Relationship Banker

Job summary

This position serves as the “Face of the Bank” with significant customer contact to include opening new accounts, service existing accounts, answer customer inquiries, recommend other services, maintenance on accounts and resolve customer problems. May take loan applications or conduct other duties in support of the lending function. Also responsible for all phases of Cash Station. Position requires general knowledge of bank operations, reducing fraud risk and mitigating losses.

Complies with all federal and state laws and regulations as well as internal policies and procedures of Crews Bank & Trust including Crews Bank & Trust's Program for Community Reinvestment (CRA), and the Crews Bank & Trust's Code of Conduct. All employees are expected to comply with these responsibilities as they relate specifically to their jobs and their performance will be evaluated on the attainment of objectives set for compliance responsibilities.

Summary of Essential Job Functions

- Puts customer first, creates an environment that makes the customer feel valued and respected.
- Thorough knowledge of the bank’s products and services, for retail, business and convenience banking products/ services, mobile banking and online banking.
- Open all types of personal and business accounts, prepare related documentation and input credit applications where applicable. Responds to customer inquiries and requests regarding account, and promotes services to provide convenience to the customer.
- Process all types of teller transactions (deposits, loan payments, change orders and other such cash transactions) in an accurate and efficient manner for personal and business accounts according to bank procedures.
- Accurately balances and processes cash drawer, vault, night depository, ATM, and other such cash supplies. Works with coworkers to maintain dual control and accountability within the branch.
- Handle customer problems, service irregularities and complaints, suggesting resolution on account disputes and other account activity. Refers escalated customer situations to Senior CRB or Relationship Banker as needed.
- Receives bank visitors, provides information and directs them to appropriate staff as necessary. Answers telephone calls, provides information and directs calls to appropriate staff as necessary. Have a developed rapport with the customer base, greet by/use name, have knowledge of account ownership, be responsive and timely with correspondence and problem resolution, and display a caring attitude.
- Identify opportunities to refer customers to line of business partners such as Trust and Lending.
- Assists with branch opening and closing duties including; vault, Night Depository, setting up cash stations, balancing cash, balancing & loading ATM, safe deposit boxes and other delegated branch procedures as necessary.
- Maintain a reasonable knowledge of all BSA requirements and related policies and procedures established under the BSA program. Attend and complete all assigned trainings in accordance to your specific job duties. Report any possible suspicious activity to the BSA Officer or designee immediately for further investigation.
- Performs other duties as assigned.



Minimum Requirements

- High school diploma or equivalent
- Minimum one to two years of banking/cash handling experience
- Good oral and written skills as well as good selling skills
- Excellent internal and external customer service skills and communication
- Desire and willingness to work in a collaborative, flexible and team oriented work environment
- Must exercise accuracy, good judgment, courtesy, tact and patience
- Ability to handle multi-tasks, and work independently without supervision
- Professional appearance and attitude

Note the Following:

- All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.
- Individuals who cannot perform some of the requirements because they pose health or safety risks to themselves or other employees might be excluded from this position.
- Requirements are representative of minimum levels of knowledge, skills and/or abilities. To perform this job successfully, the incumbent is to possess the abilities or aptitudes to perform each duty proficiently.
- This document does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.
- Must be able to lift 25 pounds.
- Are you able to perform these job duties as outlined? Yes ___ No ___
- If not, are there accommodations the Bank can made so that you can perform the duties of this job? Yes ___ No ___

Please describe below:

The above statements are intended to describe the general nature and level of the work being performed by people assigned to this work. This is not an exhaustive list of all duties and responsibilities. Crews Bank & Trust Management reserves the right to amend and change responsibilities to meet business and organizational needs as necessary.

Crews Bank & Trust is an affirmative action/equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, religion, color, national origin, sex, age, status as a protected veteran, among other things, or status as a qualified individual with disability.